

EUROPE: ITALY

1. What is the latest spa and wellness news in your country?

The spa and wellness industry represents a very important segment of the Italian economy even if, according to 2013 data from Euromonitor International, Italians remain very careful spenders and are increasingly on the lookout for bargains. The turnover of the 35,000 spas, beauty centers and gyms is over €21 billion, and sector employees number over 70,000. With these figures, Italy is in fifth place in the worldwide ranking for its personal and tourism wellness offerings. Milan and the Lombardia region together offer 36 percent of total national wellness services.

Out of the 60,000 people surveyed in Italy, 40,000 are actively concerned about their physical wellbeing and practice some sport activity, while one in six spends over around €1,200 per year on beauty and wellness products and treatments to look and feel good. Nevertheless, current statistics show that one in two Italians over the age of 20 runs the risk of becoming obese, and that most of the working population suffers from chronic stress and some kind of physical tension and pain.

The need for a combination of health and wellbeing solutions is a strong incentive for the expansion of a very new and interesting phenomenon: the growth of mini-spas within pharmacies, in combination with a wide range of supplements and innovative nutritional solutions to fight aging and excessive weight. Clients seek a new holistic professional response which uses the best from both Western and complementary medicines.

As social media and the Internet play an increasingly central role in daily life, they are supportive in educating consumers on wellness as well as helping to promote spa treatments and products. The market is very clearly moving towards a bi-polarization: low-cost services and cheap home care versus very qualified top-level centers and products.

When it comes to specifically female habits, according to a recent study published by Elle magazine, Italian women top the list of “beauty addicts” together with Japanese women. Yet such a commitment to preserving one’s beauty has some very specific features.

Compared to Asian women, Italian women are the fastest when it comes to home care and this is reflected in their growing demand for express, multiple treatments also in spas. This also pushes many women to take shortcuts to a better look by choosing surgery: Italy is sixth in the world for cosmetic surgery, mostly for bust and face rejuvenation.

Another specific phenomenon is that the major concern of Italian women is not only fighting aging but also keeping the body in shape, a true obsession, especially before the summer. This implies a very strong focus on cellulite treatments, which still represent a considerable part of the day spa business, alongside a very new beauty trend represented by nail-care mania.

Wellness also means balancing nutrition, buying organic food and selecting organic lunches for workdays, as well as investing in stress-relief weekends and vacations.

2. The industry is buzzing about wellness technologies. How do you see spa and wellness establishments in your country using wellness technologies now and in the future?

Professional equipment has always been present in day spas, including classic models such as pressotherapy for cellulite programs and a wide variety of body slimming and face rejuvenating technologies. Home care devices for face and epilation and mobile applications for wellness and fitness are also becoming very popular, partly because of the need to reduce day spa visits for economic reasons.

3. What is happening in your country in terms of wellness tourism?

In 2013, the Euromonitor International Study confirmed that health and wellness tourism is a very important resource and it is expected to increase further, reaching value sales of €1.2 billion by 2017. The trend will be supported by the increasing importance of thermal spas. In recent years, these have made huge investments to modify their offers and also provide wellness cures, in addition to pure thermal cures.

Natural, historic and sport locations have come to understand the added value for clients in offering spa as part of hotel services to attract wellness tourism, to be more competitive and also to de-seasonalize their offerings.

The first region which to understand and transform this potential into countless projects is South Tyrol-Trentino. Projects range from completely modernized public locations to 5-star hotels which have added huge wet facilities with pools, water attractions and spa rooms, as well as niche wellness centers with just a sauna and a couple of rooms in smaller hotels. Some of them also offer unique regional mountain services such as the hay bath, which is very healthy and at the same time very distinctive. Following this example, Tuscany, Sardinia and Apulia have massively developed this offer and many others are following suit.

The age range of spa goers is broad, since the first experience usually happens around the age of 25 and never really stops. The larger segment is between 35 and 60 years of age.

When it comes to Italians, one in five selects a spa location as part of their personal stress recovery program or vacation.

4. Please provide one sentence that best describes the latest developments in your country for each of these categories: hotel spas, destination spas, hot springs spas, medical spas, wellness living communities and corporate or employee wellness programs:

Hotel spas: From 3-stars to 5-stars, they are now everywhere — in historical cities as well as in tourist locations by the sea and in the mountains. The spa component is a must-have in order to remain competitive. Many include local elements from their area in the spa menu as elements of distinction.

Destination spas: Most of the destination spas in Italy are connected to natural springs and are also able to provide a unique combination of history, nature, health, beauty and luxury. A wonderful example is the Fonteverde Group in Tuscany.

Hot springs spas: This is the true “Italian Heritage” with an estimated total of 370 locations in about 170 cities and villages. They represent an impressive potential in terms of attractiveness, but are challenged by the need to modernize and improve their quality of service. National and international customers are becoming more and more demanding, and thus the ability to transform ancient traditions into a contemporary, innovative, profitable business model will determine the future of this segment.

Wellness living communities: These do not exist in Italy. Promotion and encouragement of the development and maintenance of a healthy body, mind and spirit is the objective of many urban cultural associations, which are often inspired by alternative medicines and eastern philosophies.

Corporate or employee wellness programs: These are mostly exclusive initiatives by large international corporations with branches in Italy. Technogym has created specific programs and reports. Among the Italian companies that have implemented them, Diesel and Ferrari stand out for their active approach. Ferrari has extended its wellness program, initially dedicated only to pilots and engineers, to all the employees of the Fiat group. Among smaller but more innovative companies, Davines promotes health and wellness through sustainable programs of self-care and nutrition.

5. Fast-forward five years and tell us what you think the spa and wellness industry in your country will look like.

The spa and wellness industry will influence the daily routine in terms of prevention and self-care becoming more and more related to health, which will have a new meaning: no longer only the mere absence of illness but also a positive sense of vitality and wellbeing.

The need to look younger will drive business, together with the search for serenity and stress relief obtained through self-education, dedicated assistance by spa professionals and doctors, and a combination of supplements, food and skin care.

Trust will be the key concept for spas to work on while building relationships with customers through a serious, rigorous approach. Those who spend the money will demand high quality and proven results. The era of mere pampering is over, and the time has arrived for competence and dedication to the real needs of clients. Those who can customize and still guarantee high standards will win the client's preference.

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